

Program Design & Customer Experience – Communicate Impacts

Description

You should communicate the impacts of your program—such as amount of energy saved, number of jobs created, or number of residents served—to a broad range of audiences, including staff, partners, stakeholders, funders, political leaders, and others. In some cases, providing information about impacts will be a required element of grant funding or a regulatory process. In other cases, communications is part of a strategy to maintain and build support for the continued operation or expansion of your program.

This handbook will help you take what you have learned about your program—including information about [program impacts](#) from a formal evaluation—and develop a strategy for communicating it. The handbook illustrates several examples of how impacts can be communicated, including through:

- Case studies
- Lessons learned documents
- Flyers and newsletters
- Brochures
- Websites
- Program reports.

The strategies described in this handbook complement targeted communications to partners about the impacts of specific program components, including [marketing and outreach](#), [financing](#), and [contractor engagement & workforce development](#).

Communications about overall program impacts can draw on communications materials developed for these program components as well.

Key steps for communicating impacts are:

- Determine communications requirements and purpose
- Develop a communications strategy
- Gather quantitative and qualitative information, including customer feedback
- Evaluate communications channels
- Develop communications products
- Evaluate and refine your communications strategy.

Program Design & Customer Experience

Stages:

[Overview](#)

1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. [Identify Partners](#)
4. [Make Design Decisions](#)
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. [Develop Resources](#)
8. [Deliver Program](#)
9. [Assess & Improve Processes](#)
10. **Communicate Impacts**

Find related information across other program components:

- **Market Position & Business Model – Communicate Impacts**
Publicize benefits and lessons learned resulting from your organization's success in the market.
- **Marketing & Outreach – Communicate Impacts**
Communicate marketing and outreach results internally and to partners.
- **Financing – Communicate Impacts**
Communicate the results of your financing activities to internal and external partners.
- **Contractor Engagement & Workforce Development – Communicate Impacts**
Communicate program results to contractor partners and workforce development stakeholders.

Step-by-Step

Several steps can help you successfully communicate information about the impact of your program.

Determine communications requirements and purpose

As a first step, you need to determine what you want to accomplish by communicating about the achievements of your program's impacts. This will drive your selection of target audiences, the kind of information you will need to collect or compile, the kind of product you will develop, and the channels you will use to share the information.

Some communications may be required:

- Funders will often require that you report specific information describing program progress and impacts
- If your organization is a regulated utility or works with one, you may need to provide information to regulatory bodies.

Other communications are not required, but are highly valuable to:

- Build or maintain political support
- Attract additional funding
- Create opportunities to expand or replicate your programs
- Help you support other programs by sharing lessons learned
- Maintain partnerships or attract new partners
- Build demand by demonstrating success.

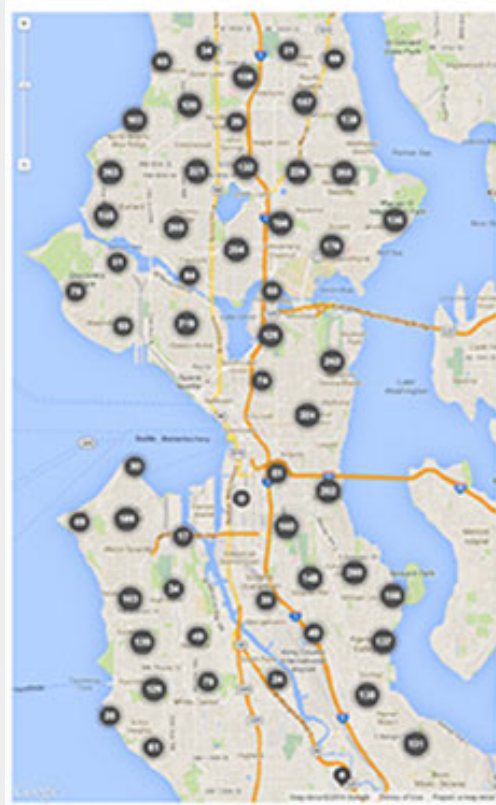
Being clear about the purpose of your communications activities will help you be efficient and ensure that you are selecting an approach that will have the most impact on the intended audience. For example, if you are interested in building demand by demonstrating success, you will want to market the impacts of your program to your potential customers and keep your current customers engaged to help them feel part of a larger community improvement effort and motivate them to promote the program to friends and neighbors. The next step will guide you through identifying audiences, messages, communications channels, and communications products based on what you seek to accomplish through communications.

Better Buildings Partners Publicize Program Results

Better Buildings Neighborhood Program partners shared the impact their programs had on their communities. These efforts raised community awareness about the impact of the programs and served to thank residents and partners for their involvement.

- [reEnergize Nebraska](#) shared information from its evaluation report with local media. A subsequent article in the Lincoln, Nebraska's Journal Star newspaper opened with the headline "reEnergize program helps 485 households in Lincoln" and went on to describe the program's over 1,300 completed residential upgrades, 485 of which were in Lincoln, including the estimate that these projects will save \$12.6 million in energy over 10 years.
- [Connecticut's Neighbor to Neighbor Energy Challenge](#) congratulated the communities that helped homeowners save energy through the challenge in [its program newsletter](#).
- [Community Power Works](#) in Seattle celebrated the work undertaken around the city—and leveraged the influence that neighbors had on each other—by providing a real-time [map](#) of how many homes in each neighborhood had undertaken an [upgrade](#).

Community Power Works Project Map



Source: [Project map](#), Community Power Works, 2014

Develop a communications strategy

Your communications strategy is your plan for how you will share specific information about your program's impacts with target audiences. It is not necessary to document your communications plan formally, but considering each of the following elements in detail will bring you greater success in demonstrating the value of your program.

Key elements of a communications strategy include:

- **The purpose of the communications.** What are you seeking to accomplish through communicating? As noted in the step above, communications can be motivated by requirements or a desire to achieve different goals, from attracting support and partners to attracting new customers.
- **Your audiences.** Who needs to hear your message for you to accomplish the purpose of your communications? Examples include potential funders, local political leaders, your customers, and local media.
- **Your messages.** What do you want your audiences to know about the program? Different target audiences typically require different messages. For example:
 - You may want to communicate to potential funders that your program has a proven track record of cost-effective energy savings.
 - You may want to communicate to potential customers that their neighbors have felt great satisfaction from undergoing home energy upgrades that increased their comfort and saved them money.
 - Some stakeholders will be interested in overall accomplishments reflected in aggregate data, while others may be more interested in specific stories and testimonials from customers or partners.

- **Your communications channels.** Through what channels will you reach your audience? Examples include in-person meetings, conference participation, direct mail, email distribution lists, websites, traditional media, and social media. This topic is covered in greater detail in the step “Evaluate communications channels” later in this handbook.
- **Your communications products.** How will you capture information and communicate it to your audiences? What products are best suited for the communications channels you’ve selected? Options include case studies, success stories, lessons learned documents, testimonials, newsletters, brochures, website text, infographics, annual reports, and others. This topic is covered in greater detail in the step “Develop communications products” later in this handbook.
- **Communications responsibilities within your program.** How will communications responsibilities be assigned? It may be the case that multiple people in your organization have communications responsibilities, but they should be coordinated and consistent.
 - Many programs have found it important to have a single point of contact and coordination for external communications.
 - In addition to overall program communications, staff involved in specific components of the program will have communications responsibilities, including [marketing and outreach](#), [financing](#), and [workforce development and contractor engagement](#).

The table below illustrates a basic template for a communications strategy, listing audience, messages, channels, products, and lead responsibilities for several different types of communication purposes.

Communications Strategy Table Template

PURPOSE	AUDIENCE(S)	MESSAGES	CHANNELS	PRODUCTS	LEAD
Build political support	Mayor, city council	Energy efficiency is improving local residents’ quality of life and saving them money	One-on-one meetings, presentations to council	One page program summary with citizen testimonials	Program manager
Attract additional funding	Foundations, government agencies	The program has a compelling business model for delivering cost-effective energy efficiency	One-on-one meetings	One page program summary, business plan	Program manager
Create opportunities to expand the program	Nearby city governments and program partners	We have an opportunity to bring the benefits of energy efficiency to a broader region through a proven program model	One-on-one meetings, presentations	Program summary, replication plan	Program summary, replication plan
Help support other programs by sharing lessons learned	Energy efficiency program administrators	Learn from what has been successful and avoid our mistakes	Conference presentations	Presentation, lessons learned report	Program manager
Attract partners	Public and non-profit organizations with a related mission	This energy efficiency program can help you achieve your goals	One-on-one meetings, presentations	Program summary	Partnership staff
Build demand by demonstrating success	Homeowners in program’s target markets	Your neighbors have increased their comfort and saved money—you can too	Local advertising, direct mail, website	Yard signs, advertisements, flyers	Marketing and outreach staff

Source: U.S. Department of Energy, 2014.

For more information on communications strategies for reaching potential customers, see the [Marketing and Outreach handbooks](#). This information may be useful as you develop a strategy for communicating about program impacts. Individual handbooks discuss specific related topics:

- The ["Make Design Decisions" handbook](#) describes identifying target customer audiences and developing messages.
- The ["Develop Resources" handbook](#) describes developing communications materials and a distribution plan utilizing communications channels.

The Evaluation & Data Collection ["Communicate Impacts" handbook](#) provides information on how to match communications materials to stakeholder interests.

Gather quantitative and qualitative information, including customer feedback

You will need to gather information to convey in your communications products. Much information will come from your formal [evaluation studies](#) and resources for assessing and improving your program. Some information will come from specific program components, including [marketing and outreach](#), [financing](#), and [contractor engagement and workforce development](#).

The three types of program-level information you are most likely to need are described below: quantitative results, qualitative information, and customer feedback.

Quantitative Results

Examples of quantitative results include the number of upgrades conducted and cumulative energy savings—often shown as progress toward program objectives. These will often draw on your formal [process and impact evaluations](#) as well as internal program management systems for assessing and improving your program. Note that ensuring data of high quality before publishing them is critical; do not underestimate the investment needed to quality-assure your program data.

Key quantitative results from your program that you might want to highlight include:

- Total assessments and upgrades completed
- Number of participating contractors, number of jobs created, and contractor work hours (see the [contractor engagement and workforce development](#) handbook for more information)
- Energy saved per upgrade and total energy saved
- Energy cost savings per homeowner and total cost savings
- Conversion rates between home energy assessments and upgrades completed
- Types of upgrades homeowners are completing through your program
- Customer satisfaction with your program's offerings and their experience working with your program
- Successful marketing and outreach initiatives undertaken by your program (see the [marketing and outreach](#) handbook for more information)
- Types of financing that homeowners are using to complete energy upgrades, the average loan amount, and the loan default rate (see the [financing](#) handbook for more information)
- Market transformation effects on the home performance industry in your community. For example:
 - Greater awareness of opportunities and benefits of home energy upgrades among homeowners, contractors, lenders, and other market actors
 - Larger, more comprehensive upgrade projects being undertaken
 - Greater quantity and quality of upgrade projects completed
 - Express energy savings as percentages (e.g. compared to a pre-upgrade energy bill or a comparable home) rather than in units of energy
 - Describe cost savings rather than energy unit savings for consumers and consumer advocates because it is expressed in terms of something very tangible (i.e., personal financial benefit)
 - Describe lifetime savings when comparing the total value of energy savings to upgrade or program, costs so that people can weigh the up-front investment against the long-term benefits.

To generate information that can be interpreted and understood by an external audience, you may need to translate quantitative information from sources such as formal evaluation studies. The Evaluation & Data Collection [Communicate Impacts handbook](#) outlines suggestions for communicating quantitative data, including:

- Express energy savings as percentages (e.g. compared to a pre-upgrade energy bill or a comparable home) rather than in units of energy
- Describe cost savings rather than energy unit savings for consumers and consumer advocates because it is expressed in terms of something very tangible (i.e., personal financial benefit)
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Expressing Data in Meaningful Ways

Communicate the impact of your program in practical ways to make program data more accessible for stakeholders who may not be as familiar with energy or environmental metrics. Two tools from the U.S. Environmental Protection Agency (EPA) may be useful:

- The [Greenhouse Gas Equivalencies Calculator](#) converts greenhouse gas emissions into everyday equivalencies, such as the equivalent number of trees planted or number of cars off the road, to achieve equivalent greenhouse gas emissions reductions. It can be used to help clearly communicate information about energy savings initiatives aimed at reducing greenhouse gas emissions. Users of the tool enter either energy data (e.g., kilowatt-hours of electricity or therms of natural gas) or emissions data, and the tool converts these data into easy-to-conceptualize terms.
- The [Co-Benefits Risk Assessment Screening Model](#) (COBRA) estimates the air quality, human health, and related economic co-benefits of initiatives that reduce air emissions. Users enter increases or decreases in emissions estimates at the county, state, or national level and receive estimates of the cost of these changes and the impact of these changes on human health.

Qualitative Information about Program Design, Operations, and Lessons Learned

To develop case studies, lessons learned resources, program reports, and other types of communications, you will likely need qualitative information about program design, operations, and insights into successes and failures. This information can include:

- Descriptions of program design and implementation
- Insights and lessons learned about successes and failures
- Summaries of feedback from staff, partners, customers, and contractors
- Ideas about future program strategies, opportunities, and challenges.

This information will often be collected directly from staff and partners. It includes information and insights from internal teams and partners working on specific program components, such as [marketing and outreach](#), [financing](#), and [contractor engagement and workforce development](#). Regular meetings used as part of your program's efforts to assess and improve, as well as regular meetings with contractors and partners, are good means to capture and track this type of information.

Customer Feedback

Positive information from customers, both homeowner and contractor, can be very powerful for gaining support for your program and for encouraging other homeowners to get involved. For example:

- Customer testimonials help demonstrate the value of your work through the words and experiences of homeowners
- Customer stories and quotations can be shared in print or through audio/visual recordings.

Customer information can be collected through homeowner surveys (see text box below and the Program Design & Customer Experience [Assess and Improve Processes handbook](#) for more information on these surveys). Information can also be collected through direct contact to gather quotations and stories about customers' involvement with your program. Contractors, call centers, and online review sites are other ways to identify customers who may have useful insights to share about your program. Internal teams and partners working on [marketing and outreach](#) are an important source of quotations, testimonials, and stories directly from customers.

You will also collect feedback from contractors about their experience with the program. See the Contractor Engagement & Workforce Development [Develop Evaluation Plans handbook](#) for more detailed information.

Homeowner Surveys

Surveys of homeowners who have gone through your program's assessment and upgrade process can be an effective tool for your program to collect information that can be used in communications materials. Surveys can help you:

- Describe overall homeowner satisfaction with the program
- Gather quotes or testimonials from homeowners

- Identify satisfied homeowners with whom to follow-up for additional information about their experience.

DOE has developed the following homeowner survey templates:

- [Example of Survey for Successful Participants](#)
- [Program Evaluation Topics & Questions Library for Program Participants.](#)

Examples of actual program surveys include:

- [RePower Bainbridge Upgrade Survey](#)
- [EnergySmart Residential Survey](#)
- [Me2 Participant Survey.](#)

Evaluate communications channels

As part of your communications strategy, you should consider which communications channels are most appropriate for your audiences and the materials you wish to provide them. To make that determination, you need to identify:

- How does my target audience receive information?
- What types of products can best be communicated using the different channels?
- What is the cost and feasibility of the communications channel(s) under consideration?

Channels for mass communications include:

- **Direct mail**, which allows you to reach a broad audience (e.g. an entire zip code). This channel is most appropriate when communication of program results is part of your marketing strategy to attract new customers or motivate existing customers to undertake further upgrade measures.
- **Social media or email lists**, which allows you to communicate rapidly with groups that have indicated an interest in your program. As with direct mail, these channels are most useful when communicating results is part of your marketing strategy.
- **Websites**, which reach a broad audience of potential customers and partners. Providing program results via websites can be part of your marketing strategy as described further below, but is also an effective way to provide information to partners or others seeking information about the success of your program.
- **Traditional media**, which can be an effective way to build recognition and public support for your program. Several communications products described below can be accompanied by a press release, interviews, or other strategies for attracting media attention.

Channels for one-on-one or small group communications include:

- **In-person meetings**, which provide you the opportunity for focused conversations with individuals or groups, such as funders, elected officials, and/or potential partners.
- **Conference, webinar, or peer exchange call participation**, which allows you to provide information (and hear questions and feedback) of particular relevance to your target audience, such as providing information about program lessons learned to other residential energy efficiency program administrators.

Develop communications products

Several kinds of communications products can be used to illustrate the impact of your program. In choosing from among these products, you should be guided by:

- Your target audience, ensuring that the product you choose is appropriate and relevant to them
- The kind of information you intend to communicate, ensuring that the product will clearly convey key messages and provide the right level of detail.

Although not a comprehensive list, the following key program communications products are described below:

- Case studies
- Lessons learned documents

- Flyers and newsletters
- Brochures
- Websites
- Program reports.

Case Studies

Case studies are a key means to highlight program success stories and to document what programs have accomplished and learned. Approaches for highlighting successes can include:

- Describing how programs have achieved or exceeded their program goals and objectives and what strategies have been key to success
- Illustrating how programs have evolved as they have learned (including learning from mistakes), refined their approaches, and adapted over time
- Highlighting positive experiences of customers, contractors, or partners
- Showcasing innovative program designs, including strategies for outreach and marketing, financing, contractor engagement, and/or workforce training.

Case studies and success stories are most powerful when they have a narrative with a protagonist (often the program administrator, but also a homeowner or contractor), a problem to be overcome, barriers faced along the way, and a resolution.

Several collections of residential energy efficiency case studies provide useful examples including:

- DOE's Spotlight [case studies](#), which describe different types of program designs and implementation strategies to share promising approaches.
 - For example, the Spotlight on Michigan: Sweeping the State for Ultimate Success [case study](#) describes how Michigan Saves undertook intensive door-to-door marketing in specific neighborhoods.
 - Other Spotlight case studies are included in the [Examples](#) section of this handbook.
- NYSEDA [case studies](#), which highlight a variety of energy upgrade projects, such as those undertaken through New York's Home Performance with ENERGY STAR program and the Green Jobs-Green New York program
- Better Buildings New Hampshire [case studies](#), which describe successful residential energy efficiency upgrades completed through the program.
- The Southwest Energy Efficiency Project's [Innovative Energy Efficiency Projects Implemented by Local Governments in the Southwest](#), which describes eight county-level and city-level residential energy efficiency programs in the Southwest.

Lessons Learned Documents

Capturing and communicating lessons learned can help other residential energy efficiency programs benefit from learning what has and has not worked for your program. You can share lessons in a variety of ways, including on your program's website or through case studies. Opportunities for direct peer-to-peer sharing (e.g., by [contributing](#) to the Better Buildings Residential Program Solution Center or by joining the [Better Buildings Residential Network](#)) are effective ways to share and discuss lessons learned.

Lessons learned should be written so that someone unfamiliar with your program will be able to understand them and translate what took place to their own context, including what did or did not work well and why. As you develop lessons learned, good questions to ask include:

- What went well and should be repeated in the future? Why?
- What did not go well and should be avoided in the future? Why?
- What would you do differently the next time?
- What insights and personal observations do you have that could help other program administrators?

For examples of ways to communicate lessons learned, see the Solutions Center's [Tips for Success](#).

Flyers and Newsletters

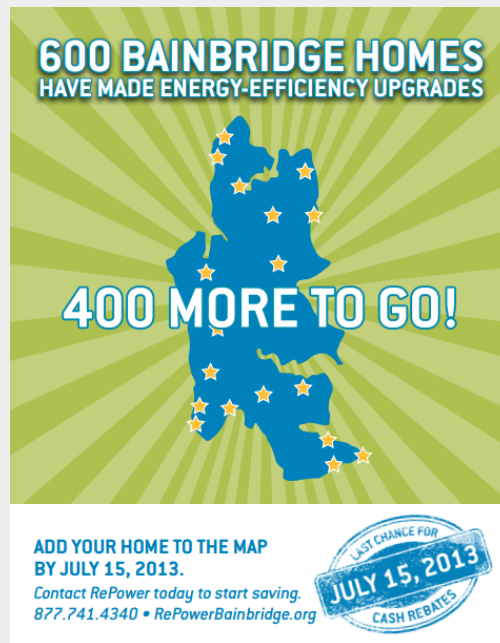
Flyers and newsletters are a way to reach out to customers to highlight new program offerings that may encourage them to undertake upgrades, to pursue deeper energy savings as follow-up to an initial upgrade, and to market the program to friends and neighbors.

RePower Programs in Washington State Keep Customers Informed about Program Success

One of the marketing and outreach lessons the [RePower program](#) of Bainbridge Island and Bremerton, Washington, learned was to provide progress updates to its residents, emphasizing how the program was making an impact. Communications materials included latest results such as the number of participating homeowners, the number of upgrades and assessments, and total kilowatt-hours saved.

For example, one flyer announced, "600 Bainbridge Homes Have Made Energy Efficiency Upgrades-400 More to Go!" These progress updates also urged action for those who had not yet participated, in an effort to encourage more customers to help the community reduce energy use. This messaging helped cultivate a social norm that many people are involved if I don't want to be left out, I should be too.

RePower Bainbridge Progress Flyer



Source: [600 Bainbridge Homes Have Made Energy Efficiency Upgrades](#), RePower Bainbridge, 2013."

Brochures and Infographics

Brochures and infographics are brief communications tools that introduce your program and can highlight the impacts you are having. These communications documents can be used for customers as well as potential funders, partners, and other stakeholders to provide a succinct description of your program and its accomplishments.

Solar and Energy Loan Fund Brochure Emphasizes Energy, Economic, and Social Impacts

The [Solar and Energy Loan Fund](#) program (SELF) in St. Lucie County, Florida, published a five-page [brochure](#) three-and-a-half years into the program to communicate its impacts, including:

- Energy and environmental impacts, such as cumulative energy savings, greenhouse gas emissions reductions, and equivalent savings in terms of gallons of gas saved
- Economic impacts, such as annual average household energy bill savings per household, number of hours contractors were employed on projects, and wages generated through financed projects
- Social impacts, such as the number of families, low-income families, women, and senior citizens served.

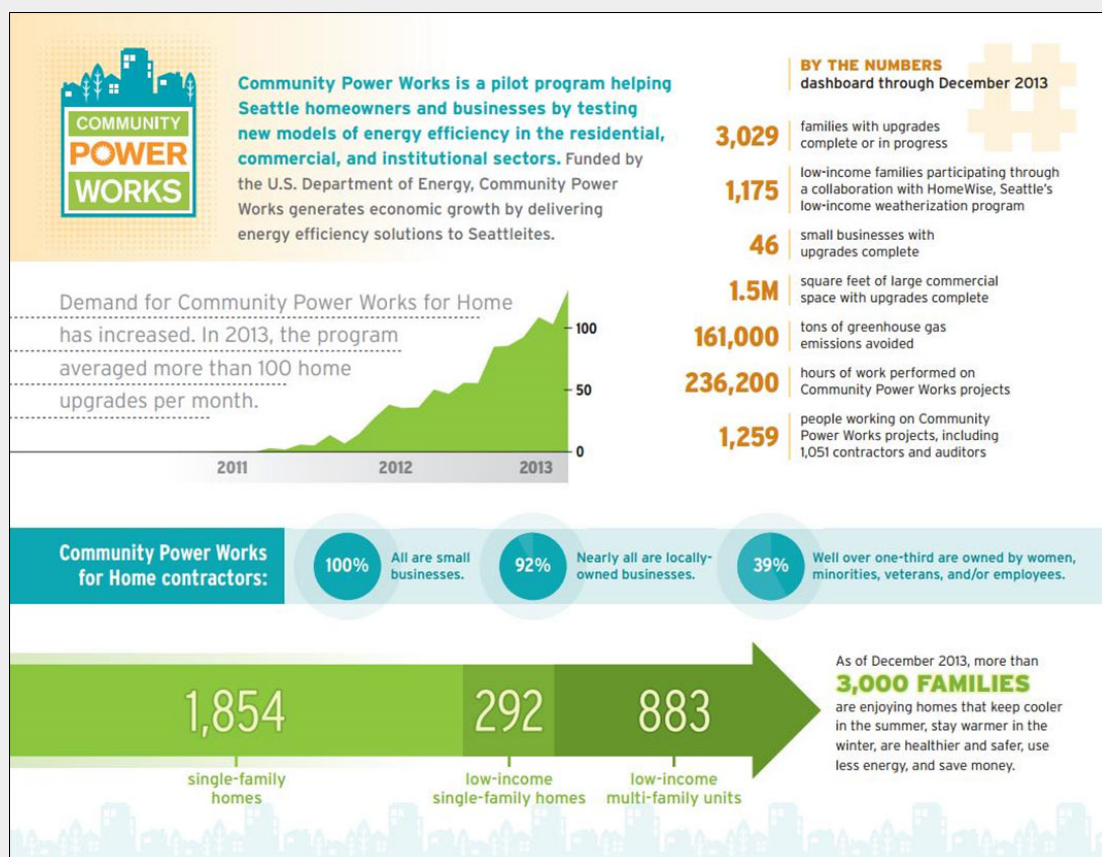
By sharing program impacts in this communications material, SELF could demonstrate the value of its work to multiple audiences.

Community Power Works Infographic Showcases Program Impacts

Community Power Works in Seattle produced an [end-of-2013 infographic](#) to highlight program accomplishments, including:

- 3,029 families with upgrades complete or in progress
- 1,175 low-income families participating through a collaboration with HomeWise, Seattle's low-income weatherization program
- 161,000 tons of greenhouse gas emissions avoided
- 236,200 hours of work performed on Community Power Works projects
- 1,259 people working on Community Power Works projects, including 1,051 contractors and energy assessors
- 30% average savings achieved across the Community Power Works portfolio.

Program Infographic



Source: [Program infographic](#), Community Power Works, 2014.

In terms of market transformation, the infographic communicated some of the findings of a mid-project evaluation by Washington State University - that Community Power Works has positively affected business practices and operations, and that assessment and building contractor practices are becoming more efficient and effective.

Websites

Websites provide ongoing visibility for programs and can be used to highlight progress to a broad audience. Although most programs use their websites primarily as portals for customer information and as an access point for program services, websites can also be used to highlight program accomplishments.

The box below highlights three innovative approaches through which programs:

- Highlight their progress and accomplishments through a publicly accessible program dashboard

- Help community members track real time energy use, raising awareness and building a sense of community responsibility to participate
- Use website widgets to provide summary information about key program metrics.

Use Real-Time Information to Communicate Program Accomplishments

Several residential energy efficiency programs use their websites to provide real-time information on program accomplishments, such as assessments, upgrades, and energy savings. Examples from Connecticut, Bainbridge Island (Washington), and Boulder County (Colorado) are highlighted below.

Connecticut

Although many programs use dashboards for internal program management, the Connecticut Energy Efficiency Fund offers an energy efficiency performance dashboard for public use. [The Connecticut Statewide Energy Efficiency Dashboard](#) offers a snapshot of how well energy efficiency programs in Connecticut are performing. It includes user-friendly graphs depicting program performance by sector, along with program expenditures and savings shown in comparison to performance goals.

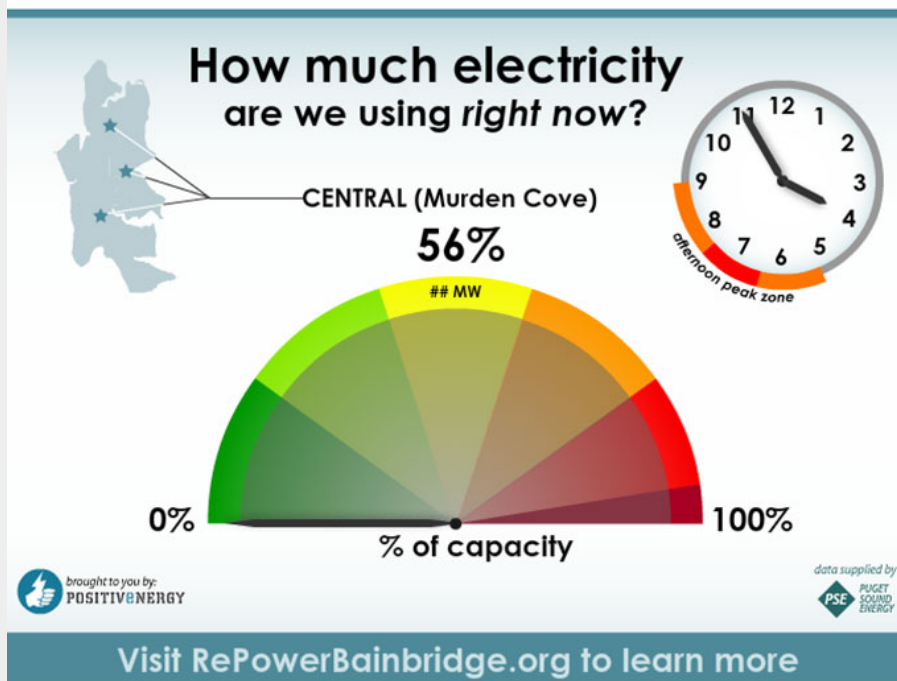


Source: [Connecticut Statewide Energy Efficiency Dashboard](#), Connecticut Energy Efficiency Fund, 2014.

Bainbridge Island, Washington

Public information about energy use can also be used to engage stakeholders in understanding and reducing energy use. The [RePower program](#) on Bainbridge Island, Washington, developed a dashboard that showed island residents their collective energy use in real time. This issue was particularly important for islanders because the local utility proposed building a new substation on the island in response to increased demand for power. The RePower program existed partly to make this unnecessary - as of 2014, the island had managed to avert the need for a new substation.

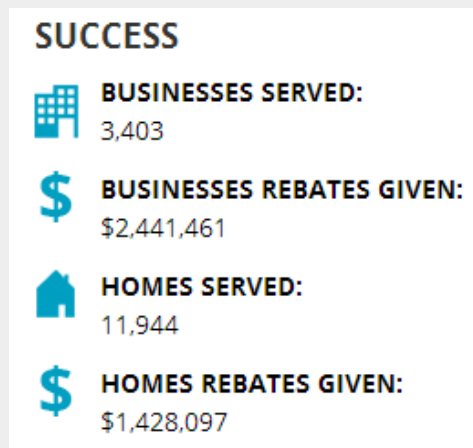
Island Energy Dashboard



Source: Island Energy Dashboard, RePower Bainbridge, 2014.

Boulder County, Colorado

Website "widgets"—like the one shown below, from Boulder's [EnergySmart](#) program—make key program outcome metrics easy to see and understand. These widgets communicate program achievements in real time to customers and stakeholders, creating a sense of accomplishments and momentum. Offering a snapshot of program success through a widget on the front page of your website invites customers and stakeholders to learn more about your services and can help demonstrate that you have experience and a track record of success.



Source: [Website widgets](#), EnergySmart, 2012.

Program Reports

Program reports provide a formal and often more comprehensive means of describing program outcomes, activities, and lessons. Through reports, your program can provide funders, partners, and other stakeholders with information including:

- Status of program outcomes and progress toward goals
- Assessment of program strategies

- Lessons learned about what has worked and what has not
- Description of anticipated future strategies and direction
- Short case studies
- Customer and stakeholder testimonials.

The following annual reports from residential energy efficiency programs illustrate the level of detail and analysis that can be included in program reports:

- Efficiency Maine's [Annual Report](#), which includes program data and success stories
- Energize Phoenix's [Energy Efficiency on an Urban Scale, Year Three Report: Results](#), which summarizes results, lessons learned, and recommendations through the final year of the Energize Phoenix award period with the U.S. Department of Energy's Better Buildings Neighborhood Program
- Seattle Community Power Works' [Fall 2012 Progress Report](#), which analyzes program accomplishments in various sectors, including results of surveys of participants, and summarizes lessons learned to date.

Evaluate and refine your communications strategy

As you implement your communications strategy, you should assess and improve it as you would any other aspect of your program:

- Gather feedback from your staff, partners, and target audiences on the extent to which communication of your program's impacts have achieved your goals
- Test different approaches to gauge each approach's success
- Draw on lessons and examples from other programs based on what they have found successful.

As you refine your program communications strategy, you may find that you need to:

- Reach out to different audiences
- Refine your messages to reflect the needs and interests of your audience
- Change your communications products and delivery channels to better correspond to how your audiences prefer to receive information.

You may also find that you need to make internal improvements to communication, for example, to ensure consistent messaging across your program.

Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

Recognize customers who make improvements

Some programs provide customers with a “certificate of completion” to recognize and reward homeowners’ accomplishment in completing an upgrade. Visible awards or affirmation, such as yard signs, window stickers, or favorable comparisons to neighbors can motivate homeowners to undertake upgrades.

- [Energy Impact Illinois](#), in partnership with [Illinois Home Performance with ENERGY STAR](#), provides a [certificate](#) to all homeowners who complete a qualifying home energy upgrade and achieve at least 15% energy savings. The certificate includes information on upgrade measures performed and expected energy savings. The Chicago Multiple Listing Service (MLS), which provides information for residential real estate transactions, added a field in 2012 that provides information about the certificate in home sales listings. Program outreach teams talk to residents about the potential for energy upgrades to increase home value at the time of sale. Feedback from homeowners suggests that the certificate, and its visibility in home transactions, was a factor (although not necessarily a primary one) motivating them to pursue upgrades. Some homeowners told the program that they decided to upgrade their homes because they planned to move and felt the upgrade would increase their home’s marketability. Residents [clearly valued the certificate](#); several contacted the program to inquire about it when it would arrive following their upgrade.
- [Eversource](#), a utility serving New Hampshire, Connecticut, and Massachusetts, undertook a pilot study to examine whether comparing homeowners’ energy use to neighbors or rewarding them for energy savings were better ways to motivate residential energy upgrades. The utility divided its New Hampshire customers into groups: some received information about their energy usage in comparison to their neighbors and some received rewards based on their energy savings; the rewards could be redeemed for gift cards or charitable gifts. Eversource found that comparing people to their neighbors resulted in greater overall energy savings; however, the rewards group showed more engagement with the program’s website, with many more of them creating online accounts. A 2015 Better Buildings Residential Network [Peer Exchange call](#) discussed the program in more detail.

Good news is addictive – spread news about program accomplishments widely and often

Successful programs use many channels to communicate accomplishments and results to stakeholders. These include word of mouth and products such as press releases, announcements on websites, case studies, and presentations. Many programs use earned media—especially local media when possible—by giving people something to talk about, such as endorsements from local personalities.

- New Orleans’ [NOLA WISE](#) program (Worthwhile Investments Save Energy) organized showcases hosted by homeowners. NOLA WISE promoted these showcases through neighborhood canvassing, electronic newsletters, social media, and collaboration with nearby neighborhood associations. The events often generated earned media coverage. NOLA WISE experienced an uptick in home energy assessment requests in neighborhoods where these events were held following the showcases.
- At the [Energize Bedford](#) launch event, Martha Stewart—one of Bedford’s best-known citizens—was a prominent attendee and supporter. Reaching well beyond the immediate community, Martha Stewart [wrote about her experience](#) on her blog, further illuminating the important work of Energize Bedford. Locally well-known people can be effective program champions as well, such as a local weather person.
- The [Solar and Energy Loan Fund](#) in St. Lucie County, Florida actively attracted media coverage by continuously refreshing its message, maintaining a sense of new activity and innovation, and stressing its contribution to the community. The program emphasized “firsts” in its messaging—such as its first loan, its first experience with crowd funding, and launching the county’s first PACE financing program. It emphasized key funding or participation milestones (e.g., \$2 million in loans issued). The program also highlighted the success of its partners and the satisfaction of clients, in addition to its own accomplishments. These activities kept the program continuously in the news.

Examples

The following resources are examples from individual residential energy efficiency programs, which include case studies, program presentations and reports, and program materials. The U.S. Department of Energy does not endorse these materials.

Case Studies

[Spotlight on Portland, Oregon: Use Incentives to Get Attention and Encourage Deep Savings](#) (2 MB)

Author: U.S. Department of Energy

Publication Date: 2012

This case study shares how Clean Energy Works Oregon (now Enhabit) used performance-based incentives, limited-time bonus rebates, early financing approvals, and seasonal advantages to implement financing tools that broaden its program reach and increase home upgrade completions.

[Spotlight on Maine: Transition to a Sustainable Level of Incentives](#) (600 KB)

Author: U.S. Department of Energy

Publication Date: 2012

This case study describes Efficiency Maine's Home Energy Savings Program (HESP), one of the few large residential energy efficiency programs that has attempted to navigate the transition from rebate-focused offerings to financing focused offerings that better align with its limited budget.

[Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions](#) (411 KB)

Author: U.S. Department of Energy

Publication Date: 2012

This case study explains how Maine provided contractor sales training to boost upgrade conversions.

[Spotlight on Seattle, Washington: Community Partnerships Work to Extend Program Reach](#) (5 MB)

Author: U.S. Department of Energy

Publication Date: 2011

This case study shares how Seattle's Community Power Works engaged a vast network of partners to build on existing capacity and knowledge, extending the reach of its program in a short period of time.

[Spotlight on Austin, Texas: Let Your Contractor Be Your Guide for Big Rewards](#) (445 KB)

Author: U.S. Department of Energy

Publication Date: 2011

This case study discusses strategies that Austin Energy, a municipally owned utility, used to collaborate closely with building contractors to launch a new Best Offer Ever promotion quickly and effectively.

[NYSERDA Home Performance Case Studies](#)

Author: New York State Energy Research and Development Authority

Publication Date: 2013

Links to case studies of residential projects and contractors under the New York State Energy Research and Development Authority (NYSERDA)'s Home Performance with ENERGY STAR program.

[Case Studies for Better Buildings New Hampshire](#)

Author: New Hampshire Better Buildings Program

Publication Date: 2013

Collection of case studies from New Hampshire that highlight successful energy efficiency upgrades.

[Spotlight on Michigan: Sweeping the State for Ultimate Success](#) (500 KB)

Author: U.S. Department of Energy

Publication Date: 2011

This case study describes an innovative program design used by BetterBuildings for Michigan to "sweep" neighborhoods in order to effectively reach its residential audience and achieve an 80% participation rate among those canvassed.

[Innovative Energy Efficiency Projects Implemented by Local Governments in the Southwest](#)

Author: Southwest Energy Efficiency Project

Publication Date: 2012

Descriptions of eight county-level and city-level energy efficiency programs in the Southwest.

[Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time](#) (555 KB)

Author: U.S. Department of Energy

Publication Date: 2011

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months--more than 10 times the utility's typical participation rate. To quickly develop momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy assessments, inspections, improvements, and loan origination, while learning valuable lessons along the way.

[Spotlight on Rutland County, Vermont: How Local Ties Lead to Local Wins](#) (552 KB)

Author: U.S. Department of Energy

Publication Date: 2011

Building on its understanding of homeowners in Rutland County, Vermont, NeighborWorks of Western Vermont (NWWVT) enlisted respected local citizens and organizations to spread the word about home energy efficiency upgrade opportunities, an effort that helped drive demand for nearly 200 home upgrades in just six months

Program Presentations & Reports

[2013 Annual Report of the Efficiency Maine Trust](#)

Author: Efficiency Maine

Publication Date: 2013

Year in review annual report which includes program data and success stories.

[EnergySmart Program Progress Review](#)

Author: Navigant, Inc. (Prepared for Boulder County)

Publication Date: 2012

This progress report provides community members and others interested in EnergySmart with a clear snapshot of its progress. The report also provides a timeline of energy efficiency policies and programs in Boulder County.

[LEAP Annual Report 2012](#)

Author: Local Energy Alliance Program

Publication Date: 2013

This annual report summarizes the program's accomplishments in 2012, including the number of home upgrades, the cumulative amount of private investment leveraged for energy efficiency improvements, cumulative annual cost savings for building owners, and jobs created. It also includes testimonials from LEAP customers.

[Seattle Community Power Works Fall 2012 Progress Report](#)

Author: Washington State University Energy Program

Publication Date: 2012

This mid-program evaluation includes extensive analysis of program sectors, including results of surveys of participants, and summarizes lessons learned to date.

Program Materials

[Request for Proposals: Development and Execution of the Communications Strategy for the Chicago Region Retrofit Ramp-Up \(CR3\) Program](#) (313 KB)

Author: Chicago Metropolitan Agency for Planning

Publication Date: 2010

This sample RFP from Chicago can be used as an example when developing a communications strategy.

[Energy Upgrade California Marketing and Communications Plan](#) (2 MB)

Author: Energy Upgrade California

Publication Date: 2010

This marketing and communications plan from Energy Upgrade California includes a goal to reduce aggregate greenhouse gas emissions through energy and resource-saving upgrades of existing building stock. The plan also outlines several objectives the program developed to help them meet this goal.

[Me2 Participant Survey](#) (554 KB)

Author: Me2

Publication Date: 2011

Participant survey sent to Me2 customers that have completed at least the initial Energy Advocate visit.

[RePower Bainbridge Upgrade Survey](#) (333 KB)

Author: RePower Bainbridge

Publication Date: 2012

Homeowner data collection survey created by RePower.

Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

Templates & Forms

[Example Survey for Successful Participants](#) (144 KB)

Author: U.S. Department of Energy

Publication Date: 2011

Sample email survey template for successful program participants.

[Program Evaluation Topics & Questions Library for Program Participants](#) (163 KB)

Author: U.S. Department of Energy

Publication Date: 2011

This document provides a menu of initial questions for a program administrator or implementer to build on and use in developing a real-time evaluation survey to collect qualitative data from program participants.

Tools & Calculators

[Co-Benefits Risk Assessment \(COBRA\) Screening Model](#)

Author: U.S. Environmental Protection Agency

Publication Date: 2012

A tool that estimates the air quality, human health, and related economic co-benefits (such as energy efficiency) of initiatives that reduce air emissions.

[EPA Greenhouse Gas Equivalencies Calculator](#)

Author: U.S. Environmental Protection Agency

Publication Date: 2014

A calculator that converts greenhouse gas emissions into everyday equivalencies. It can be used to help clearly communicate information about energy savings initiatives aimed at reducing greenhouse gas emissions.

Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#) for materials from and about individual programs.

Topical Presentations

[The High Performance Value Chain & Chicago's Residential Energy Disclosure Requirements](#)

Author: CNT Energy; National Home Performance Council

Publication Date: 2015

This presentation provides an overview of the CNT Energy and National Home Performance Council white paper "Unlocking the Value of an Energy Efficient Home: A Blueprint to Make Energy Efficiency Improvements Visible in the Real Estate Market." It covers making information about energy efficiency improvements visible to home buyers and others involved in a home sale transaction.

Publications

[Unlocking the Value of an Energy Efficient Home: A Blueprint to Make Energy Efficiency Improvements Visible in the Real Estate Market](#)

Author: CNT Energy; National Home Performance Council

Publication Date: 2013

This white paper provides energy efficiency program sponsors and other stakeholders in the home performance industry with methods to document efficiency improvements and incorporate them into the real estate value chain. Making information about energy efficiency improvements visible to home buyers and others involved in a home sale transaction will play a crucial role in ensuring that improvements are fairly valued at the time an existing home is sold.

[Capturing Energy Efficiency in Residential Real Estate Transactions: Steps That Energy Efficiency Programs Can Take](#) (875 KB)

Author: U.S. Department of Energy

Publication Date: 2015

Real estate professionals are increasingly aware that today's homebuyers consider heating and cooling costs, efficient appliances, and efficient lighting to be important factors in home purchase decisions. Residential energy efficiency and real estate stakeholders, however, agree that the home resale process frequently fails to account for the value of high-performance home features. If investments in energy efficiency were more accurately reflected in home resale prices, homeowners could have greater confidence that these investments would be recouped at resale, and they might make more investments in efficiency.

Webcasts

Tips and Tools for Promoting Your Energy Efficiency Project

[Presentation](#), [Media](#) (53 MB), [Transcript](#)

Author: Jim Arwood, National Association of State Energy Officials; Nancy Raca, ICF International

Publication Date: 2010

This webcast provides information on why outreach is important for program success and how programs can promote their efforts.

Capturing Energy Efficiency in Residential Real Estate Transactions Webcast

[Presentation](#), [Media](#)

Author: U.S. Department of Energy

Publication Date: 2015

This webcast covers DOE's new white paper, Capturing Energy Efficiency in Residential Real Estate Transactions, which highlights how residential energy efficiency programs can help make homes' energy efficiency visible to appraisers, real estate agents, mortgage lenders, homebuyers and sellers. The webcast provides examples of programs around the U.S. that are successfully engaging the real estate community and overcoming barriers to valuing energy efficiency in the home resale process.

